

## **APPENDIX D: COMMON INTAKE AND CASE MANAGEMENT CHARTERS**

# **CASE MANAGEMENT WORK GROUP CHARTER**

### **Section I – Work Group Description**

#### **A. Introduction:**

One of the key components for California's Worknet system will be the ability of the One-Stop Center partners to provide case management services for job, education, and training seekers. An important tool in case management is computer software that will allow One-Stop Career Center Partners to track and monitor services that individuals are receiving in an integrated and cooperative business environment.

The implementation grant application, which was submitted to the Department of Labor in August 1996 and approved in November 1996, described how existing case management products would be evaluated and piloted during the first year of the grant period. In future years, activities were identified to implement an automated case management tool statewide based on the outcomes of the pilot.

#### **B. Scope**

The Case Management Work group will examine common case management components, determine business and technology needs of a case management system, and identify piloting opportunities to the Electronic One-Stop Steering Committee (EOSSC).

The term "case management" means the provision of a client-centered, approach in the delivery of services designed to:

1. Prepare and coordinate comprehensive employment plans for participants to ensure access to the necessary One-Stop services.
2. Track employment and training services and outcomes.
3. Share case management information between One-Stop partners (within and/or between One-Stop Centers).

### **C. Objectives**

The Case Management Work group scope will meet the following objectives:

1. Allow the State and local entities to begin case management software investment by June 1997.
2. Provide guidance to all One-Stop Centers pursuing case management tools.
3. Be able to evaluate case management pilots that could be expanded statewide.

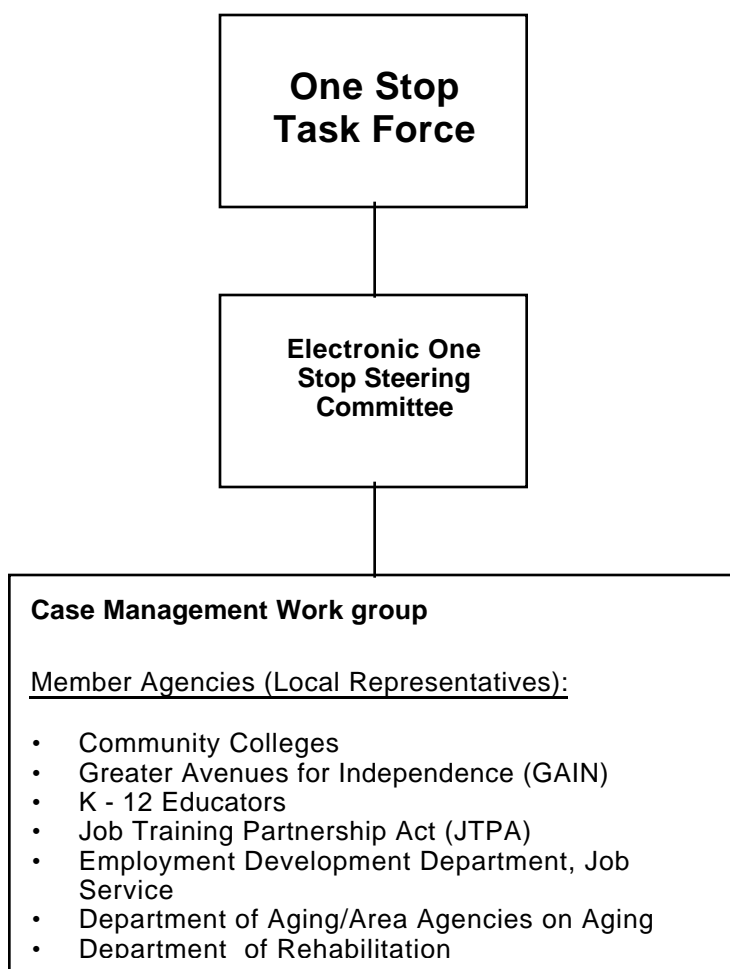
### **D. Deliverables**

The Case Management Work group will submit to the EOSSC the following products for their approval:

1. Monthly status reports consisting of:
  - Activities accomplished
  - Activities in progress
  - Issues requiring resolution
2. A Final Report consisting of:
  - High Level description of the One-Stop case management components
  - Business requirements of the One-Stop case management system
  - Information technology requirements necessary to successfully operate a common case management system
3. A Presentation of the Final Report to the EOSSC

## Section II -- Work group Management

### A. Work group



### B. Work group Management

The Work group Facilitator is responsible for:

- Ensuring objectives are met.
- Ensuring deliverables are completed.
- Reporting Work group status to the EOSSC.
- Elevating issues that cannot be resolved by the Work group to the EOSSC.
- Scheduling Work group meetings and providing the necessary agenda and structure.
- Facilitating or assigning facilitation of working session of Work group meetings.



The Work group members are responsible for:

- Representing their respective agency.
- Gathering input from their peer agencies.
- Attending scheduled Work group meetings.
- Participating in Work group meetings and assignments.
- Ensuring the Work group meets all deliverable dates.
- Ensuring deliverables are completed.

### **Section III -- Work group Structure**

#### **A. Work group Schedule**

<b>Milestone</b>	<b>Completion Date</b>
Work group Members Identified	February 1997
Work group meetings	February - June 1997
Complete final report	June 1997
Present final report to EOSSC	June 1997
Present recommendations to One-Stop Task Force	June 1997

#### **B. Approval Process**

The EOSSC must approve any change(s) in scope or schedule.

The Case Management Work group will present a final report to the EOSSC for final acceptance. The EOSSC may choose to modify the recommendations before the final recommendations are presented to the One-Stop Task Force for approval.

#### **C. Issue Resolution Process**

The Case Management Work group Facilitator will raise issues to the Chair of the EOSSC for resolution or presentation to the EOSSC.

**D. Case Management Work group Charter Acceptance**

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**Case Management Work group Facilitator**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Electronic One-Stop Steering Committee Chair**

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**Date**

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**One-Stop Task Force Chair**

\_\_\_\_\_  
**Date**

## **COMMON INTAKE WORK GROUP CHARTER**

### **Section I - Work group Description**

#### **A. Introduction:**

One of the key components for California's Worknet system will be the ability of the One-Stop Centers to utilize a common intake system that allows the job education/training seekers to provide information about themselves, which can be shared by the One-stop partners. An important tool in common intake will be computer software that will allow for the collection, capture, and sharing of this information between the One-Stop partners.

In California's 1996/97 One-Stop Implementation Grant, activities were identified and funding established to pilot common intake system/s in the first year of the grant. In future years, activities were identified to implement Common Intake statewide based on the outcomes of the pilots.

#### **B. Scope**

The Common Intake Work group will examine the common One-Stop intake components, determine business and technology needs of a common intake system, and identify piloting opportunities to the Electronic One-Stop Steering Committee (EOSSC).

The common intake process begins when a One-Stop customer is determined to need intensive services (above and beyond universally available information and services) and ends when the necessary eligibility and demographic information has been collected to initiate a case record for that customer. The scope includes program specific demographic and eligibility data for all participating partners in the local one-stop systems, including information necessary to report an individual for inclusion in the State's future "Job Training Report Card" system authorized by Senate Bill 645.

#### **C. Objectives**

The Common Intake Work group will meet the following objectives:

1. Allow the State and local entities to begin common intake software investment by June 1997.
2. Provide guidance to all One-Stop Centers pursuing common intake tools.
3. Be able to evaluate common intake pilots that could be expanded statewide.

## **D. Deliverables**

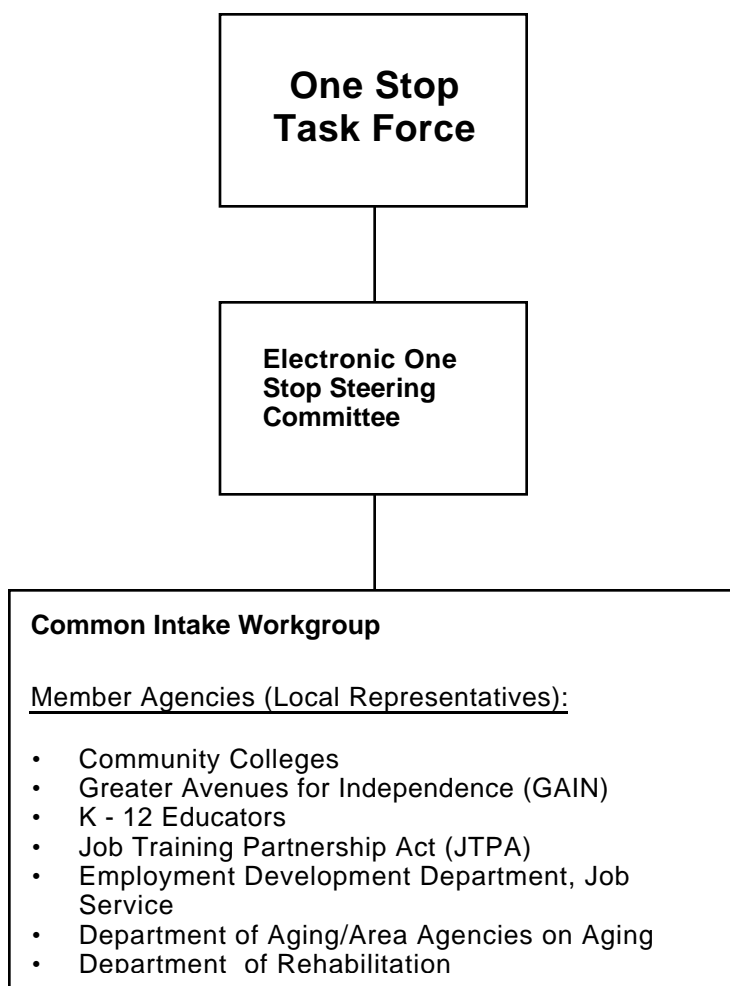
The Common Intake Work group will submit to the EOSSC the following products for their approval:

1. Monthly status reports consisting of:
  - Activities accomplished
  - Activities in progress
  - Issues requiring resolution
2. Final Report consisting of:
  - High Level description of the One-Stop common intake components
  - Business requirements of the One-Stop common intake system
  - Information technology requirements necessary to successfully operate a common intake system
3. Presentation of the final report to the EOSSC



## Section II - Work group Management

### A. Work group



### B. Work group Management

The Work group Facilitator is responsible for:

- Ensuring objectives are met.
- Ensuring deliverables are completed.
- Reporting Work group status to EOSSC.
- Elevating issues that cannot be resolved by the Work group to the EOSSC
- Scheduling Work group meetings and providing the necessary agenda and structure.
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- Gathering input from their peer agencies.
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- Participating in Work group meetings and assignments.
- Ensuring the Work group meets all deliverable dates.
- Ensuring deliverables are completed.

### **Section III - Work group Structure**

#### **A. Work group Schedule**

<b>Milestone</b>	<b>Completion Date</b>
Work group members identified	February 1997
Work group meetings	February - June 1997
Complete final report	June 1997
Present final report to EOSSC	June 1997
Present recommendations to One-Stop Task Force	June 1997

#### **B. Approval Process**

The EOSSC must approve any change(s) in scope or schedule.

The Common Intake Work group will present their final report to the EOSSC for final acceptance. The EOSSC may choose to modify the recommendations before the final recommendations are presented to the One-Stop Task Force for approval.

#### **C. Issue Resolution Process**

The Common Intake Work group Facilitator will raise issues to the Chair of the EOSSC for resolution or presentation to the EOSSC.

**D. Common Intake Work group Charter Acceptance**

\_\_\_\_\_  
Common Intake Work group Facilitator

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Date

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Electronic One-Stop Steering Committee Chair

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Date

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One-Stop Task Force Chair

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Date